



EUROPEAN COMMISSION

DIRECTORATE-GENERAL FOR MARITIME AFFAIRS AND FISHERIES

MEDITERRANEAN AND BLACK SEA

MARITIME POLICY MEDITERRANEAN AND BLACK SEA

Challenges and Opportunities for Maritime and Coastal Tourism in the EU

Summary Report of the Online Public Consultation Results

1. Maritime and Coastal Tourism in the EU

Europe's coasts combine a rich maritime heritage and tradition with an unrivalled diversity of landscapes and natural refuges. Its oceans and seas are known for its biological richness and indescribable beauty. Unsurprisingly, coastal and maritime tourism constitutes one of the most important touristic thematic sub-sectors in Europe. With more than 2.36 million people employed, coastal and maritime tourism represents 1.1% of the total EU employment. Moreover, around 51% of bed capacity in hotels across Europe is concentrated in regions with a sea border, highly contributing to the economy of these regions. With perspectives for growth in the coming years, coastal and maritime tourism full potential is yet to be unveiled. Guaranteeing the conditions for the sustainable development of coastal and maritime tourism may significantly contribute to Europe's economic growth and employment. It can also support the sustainable development of the more remote coastal regions, bringing Europe closer together and endowing coastal communities with sustainable solutions for the future.

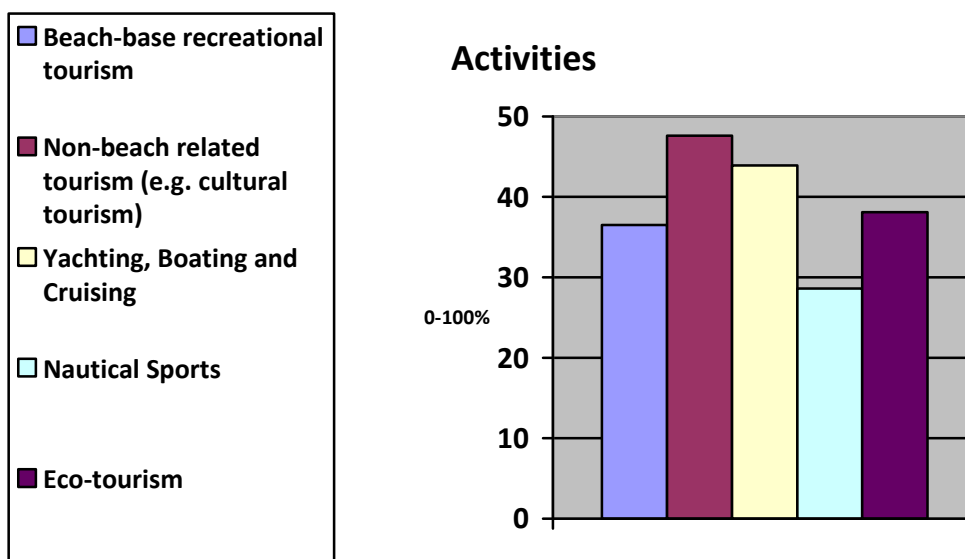
Aware of this potential, the European Commission is currently developing a strategy to provide Europe with complementary tools to foster a smarter, more sustainable and inclusive coastal and maritime tourism in Europe. In the definition of such a strategy, participation from interested stakeholders is of outmost importance. Thus, and in order to gather direct input from interested parties on recommendations and actions that can be facilitated and promoted at European level, a 12-week public consultation was launched from 14 of May until 6 of August 2012.

A total number of 192 responses to the public consultation were received, with a significant participation from national and regional governments (31.9%) and private businesses (14.9%), but also with contributions from universities (6.9%) and research institutes (5.3%), private individuals (5.8%), International Organizations (4.2%), European institutions (1.1%), Commission services (0.5%) and the media (0.5%). A high number of contributions were also received under the generic category "other" (28.6%), mainly coming from trans-regional tourism stakeholders and European networks. Most of the respondents that participated in the public consultation declared having a very good knowledge of coastal and maritime tourism (60.3%).

The results of this public consultation will be taken into account in the formulation of the Communication on Challenges and Opportunities for Maritime and Coastal Tourism in Europe. Of the total number of contributions received (192), a very small number were received in letter format (3). Such contributions to the public consultation did not follow the published survey format and, as such, were not included in the percentage results presented hereby. The opinions expressed in these letters will, nonetheless, be evaluated and taken into consideration in the drafting of the European strategy on coastal and maritime tourism.

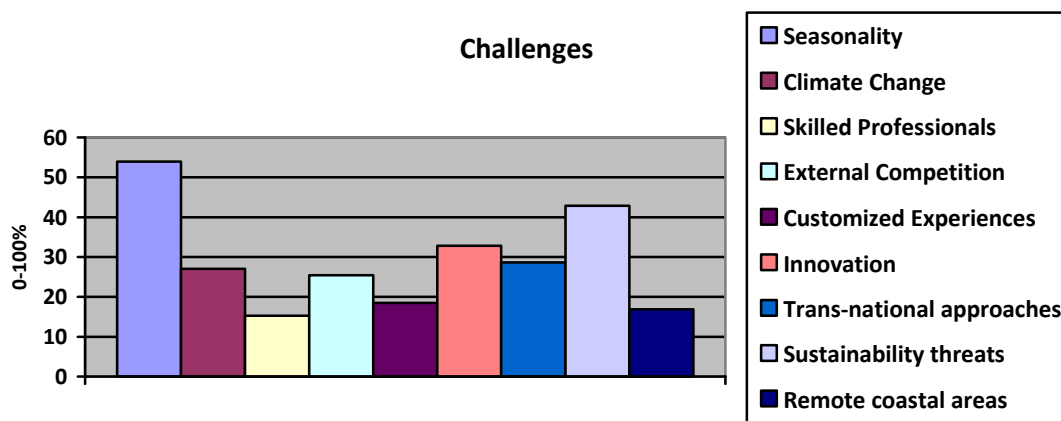
2. A European Strategy for Maritime and Coastal Tourism

The most relevant touristic activities for the development of a competitive and sustainable coastal and maritime strategy for Europe are, according to the majority of the participants in the consultation, non-beach related tourism activities (e.g. heritage based tourism, cultural tourism, gastronomic events) and yachting, boating and cruising. Eco-tourism, beach-based recreational tourism and nautical sports followed in the list of preferred activities with potential to foster the competitiveness of the sector¹.



Seasonality and sustainability threats (including a growing carbon footprint, water scarcity and pressure on natural resources and habitats) were identified as the main challenges ahead for maritime and coastal tourism in Europe (54% and 42,9% of the participants, respectively, ranked these challenge as "very important"). In decreasing order of importance, respondents considered that the following issues should also be taken into consideration: the lack of product diversification and innovation strategies (32,8%), the lack of coordinated trans-national and trans-regional approaches (28,6%), climate change (27%), growing competition from non-EU destinations (25,4%), growing request for customized experiences (18,5%), the under-development of remote coastal areas (16,9%), and the lack of skilled professionals in the sector (15,3%).

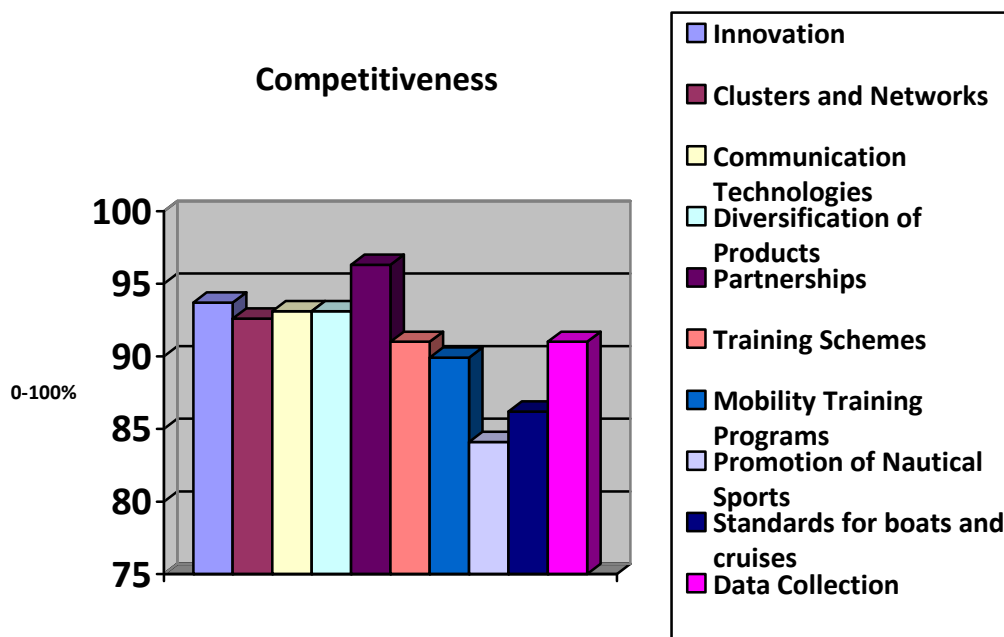
¹ Non-beach related tourism was classified as "very important" by 47,6% of the respondents, followed by yachting, boating and cruising (43,9%), eco-tourism (38,1%), beach-based recreational tourism (36,5%) and nautical sports (28,6%). Respondents were asked to evaluate each of these activities in a scale of 1 ("not important") to 5 ("very important").



3. Competitiveness – Rendering Maritime and Coastal Tourism More Competitive

Innovation challenges in the coastal and maritime tourism sub-sector hinder Europe's competitiveness, according to the substantial majority of participants in the consultation (93,7%). In the realm of the possible solutions to increase competitiveness, respondents favoured an European support for initiatives encouraging the development of partnerships between tourism operators and local commerce as a way of broadening the touristic offer (96,3% contributors considered it as "very important"). Nonetheless, all other proposed initiatives were also broadly supported as very important steps towards fostering competitiveness in coastal and maritime tourism in Europe. These initiatives gathered the following overall endorsement: support for the promotion on the diversification of products and services (93,1%), the encouragement towards the use of information and communication technologies among public and private stakeholders (93,1%), the setting up of clusters and networks of stakeholders to improve sectorial organization (including at trans-national and trans-regional level, 92,6%)², the collection of sectorial data at European level (91%), support for training schemes and programmes aimed at developing skills and improving education levels among Europeans (91%), the creation of specific mobility training programmes for students and teachers of tourism and maritime schools (89,9%), the promotion of standards and procedures in port destinations for cruises and other recreational boats (86,2%) and, finally, the promotion of Europe as a destination for nautical and other sports (84,1%).

² From the various trans-national and trans-regional initiatives suggested in the consultation, participants favoured those initiatives aimed at developing common transport infrastructures for better accessibility (41,3% considered it as "very important"), together with initiatives promoting a common cultural or industrial maritime heritage (34,4%) and those promoting combined itineraries for eco-tourism (32,8%). The creation of common quality standards and awards was considered a very important initiative for 31,7% of the respondents, while other initiatives collected a less expressive support, such as the promotion of joint mobility programmes for employees in the tourism sector (23,8%), combined cruise destination itineraries (21,2%) and combined itineraries for nautical ports (17,5%)



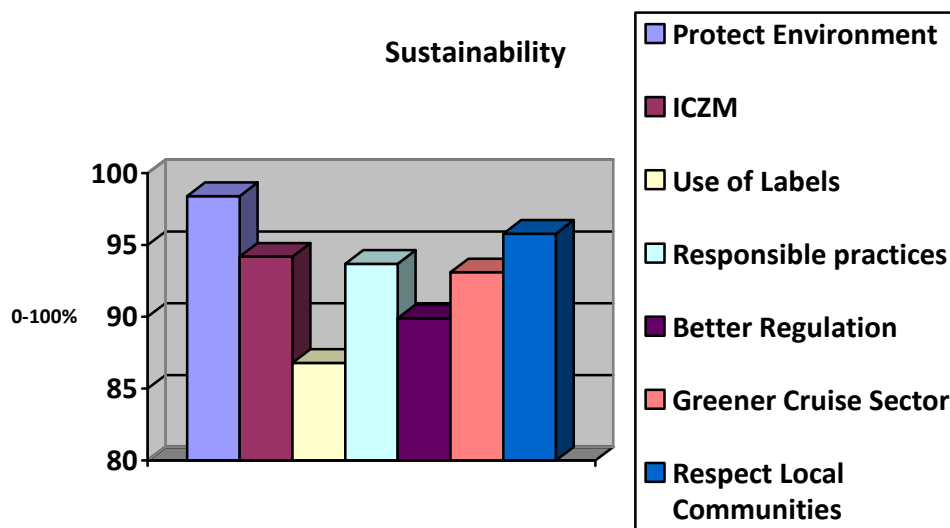
4. Sustainability – Sustainable Tourism Growth in maritime and Coastal regions

The need to guarantee the sustainability of the sector was a clear priority for the survey participants: 98.4% of the respondents prioritized the need for a strategy which protects the physical and natural environment of coastal regions by supporting sustainable economic and social measures whilst mitigating adverse impacts. Ensuring that coastal and maritime tourism respects and benefits local communities was another concern which received ample support (95,7%). In a similar vein, the need to encourage responsible practices by European tourism enterprises and by tourists themselves was substantially endorsed by the majority of the respondents (93,6%).

Highlighting the importance of strategic and integrated coastal zone management within maritime and coastal regions with the aim to reconcile the interest of all maritime economic actors (including e.g. fisheries, the energy sector, or maritime transport) was considered important by 94,1% of the participants in the questionnaire.

In terms of environmental sustainability, the development of incentives for greener and environmental-friendly technologies in the cruise sector (e.g. with regard to energy efficiency, waste reduction and treatment, or pollution prevention) was also identified as a very important priority for 93.1% of the respondents.

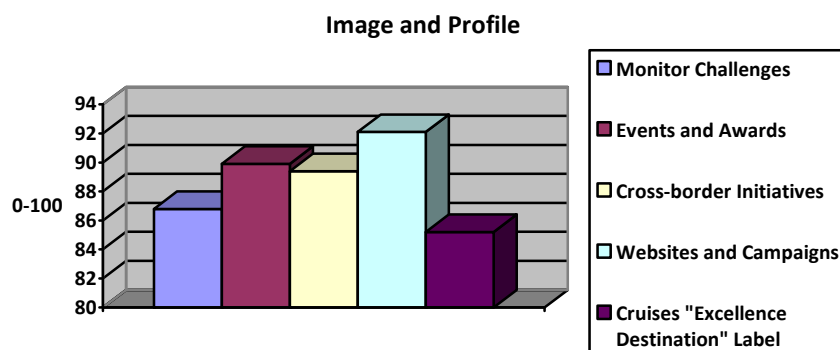
Finally, a large majority of the respondents (89,9%) supported better regulation as a way to promote sustainable business practices among maritime stakeholders



5. Image and Profile – Strengthening the Image and Profile of Europe's Maritime and Coastal Regions

The results of the public consultation show a general agreement that there is a need to strengthen the image and profile of Europe's maritime and coastal tourism. The promotion of websites with information and promotional campaigns by sea basins, together with dedicated communication approaches for certain target groups, was the initiative which reunited broader support (92%). Highly encouraged was also the idea of promoting the richness and diversity of Europe's maritime and coastal regions, through initiatives like the annual European Maritime Day celebrations (89.9%).

According to the participants in the survey, cross-border promotional initiatives and activities amongst stakeholders on coastal destinations should be highly incentivised as well (89.4%). Other initiatives endorsed as important to the majority of the participants included the need to monitor sectorial challenges such as the growing international competition from overseas maritime destinations (86,9%), together with the idea of developing an "excellence destination" label for cruise stops rewarding high quality standard port cities (85.1%).



6. Conclusion

As a Blue Growth sector, coastal and maritime tourism has been identified as an area with special potential to foster smart, sustainable and inclusive Europe. The high level of participation in the public consultation "Challenges and Opportunities for Coastal and Maritime Tourism in Europe", and the overall support for the roll of possible the initiatives suggested in the survey, demonstrates a broad endorsement and support from European stakeholders towards an EU strategy for this touristic sub-sector.

7. Annex

Summarized Collection of Replies to the Open Questions in the Public Consultation "Challenges and Opportunities for Maritime and Coastal Tourism in Europe"-

Question 0.0.2: Please identify other relevant sectors/activities in coastal and maritime tourism you believe would benefit from a European comprehensive strategy on coastal and maritime tourism.

Participants replies included the following suggestions: Health and wellness tourism; social tourism; agro-tourism (partnerships with); educational tourism; eno-gastronomic tourism; fishing tourism; nautical excursions in historical boats; cycle tourism; wildlife observation tourism; long distance coastal walking paths; underwater archaeology; maritime heritage tourism (including ship building); adventure tourism; events and festivals tourism; MICE tourism.

Question 0.1.2: Please list any other challenges which constitute, in your opinion, real obstacles to the enhancement of Europe's maritime and coastal tourism full potential for growth and employment.

Participants replies included the following suggestions: Lack of regulatory protection of maritime resources; lack of real macro-regional strategies/lack of coordinated and coherent sectorial actions/lack of a common policy; need for the re-adaptation of coastal resorts; space dispute in coastal areas; lack of a strong policy on maritime transport security; heritage requalification; accessibility/connectivity; lower cost structures in non-EU; lack of support to SMEs; lack of funding/difficulties in accessing financial support; Visa requirement for non EU citizens; lack of reliable local and regional tourism data/research; unification of boat and yachts cross border report systems; saturation of marinas and lack of common standards (operational, safety and security); lack of port infrastructure and services, especially in remote regions; lack of cooperation between all actors that play a role in tourism (public authorities and private stakeholders); lack of funding for flooding and coastal erosion; sewage and waste management; sea water pollution.

Question 1.2.2: Please identify other trans-national and trans-regional initiatives which you consider relevant to increase the competitiveness of maritime and coastal tourism.

Participants replies included the following suggestions: Develop lifelong learning programs, with interregional centres for employees and students of the tourism sector (particularly on islands); development of macro-regional strategies; share of good practices/creation of appropriate *fora* to exchange ideas and experiences; creation of transnational cycling paths along the coast; recovery of disused transnational railway lines along the coast; setting up of hiking, horseback-riding and cycling transnational itineraries; initiative to create different tourist packages from different tourist activities into one; connectivity (improvement of connections, road, maritime); enhancement of architectural and archaeological heritage; Marine and Coastal Sustainable Tourism Charter; Integrated Territorial & ITC Development Model; Coastal Quality Label; transnational cultural/heritage routes along the coast; development of ICZM tools; data sharing and methodologies; support for cooperation initiatives and funding mechanisms for the private sector; establishment of a network of knowledge sharing; coastal tourism centres of excellence promoting coastal tourism product innovation, customer service development and coastal tourism business support; common standards for maritime transport safety; common architecture standards according to the local architecture; harmonisation of visa requirements and procedures for tourists; common promotion of European destinations; development of a programme to promote senior tourism within EU countries; development of a programme to promote nautical activities addressed to scholars (e.g. Blue Week); address legal obstacles to free circulation of boats and boaters in EU waters (lack of mutual recognition of national qualifications); identify existing discrepancies in professional qualifications for boating professions; promote cruising and sailing tourism in early and late season; sponsor eco-friendly boating like sailing boats; port development; research on tourist behaviour and on profitability and environmental sustainability at a local (destination) scale; enhancement of entrepreneurial skills (e.g. training on image and branding, knowledge of consumer trends, new strategies to face the increasing demand on resources and communities, on how to start a new company, knowledge of languages and culture); creation of marine tourism education programs with emphasis on ways to offer high quality services and protecting the marine environment.

Question 1.3.1: Please list the information and communication technologies that you believe would contribute to innovation in maritime and coastal tourism.

Participants replies included the following suggestions: E-learning platforms (coastal businesses and employees able to access tailored training at a time that suits them); e-commerce platforms; web-marketing including through a website with all the information related to tourism and sea, including Community data base; better travel information including applications; better use of social networking (e.g. facebook), blogs and follower groups for promotional efforts; better use of on-line offers by transport

providers; interactive e-guides with information on culture and traditions; applications with maritime itineraries; port management technologies; visual tours (quality web cameras located in the maritime and coastal destinations and underwater technology for monitoring and safeguarding marine life); better broadband access in outlying regions; free wi-fi areas; free info zones; a mapping or an atlas application with a specific touristic scope (including codes of conduct); collaborative software in the design of public policies; increase of shared systems/networking in surveillance and monitoring activities in marine ecosystems; realistic interactive and passive 3D simulations for mobile phone applications of coastal/marine world that would contribute to visitors understanding of the area and inspire people about cultural, historical and natural heritage and maritime history; ICT tools developed in the framework of the TOURISMLink project; development of collective applications at the relevant scale: touring (bicycle, river, hiking), weather and sea (conditions of navigation, weather, information such as water quality, flows management); development of a joint online platform where tourism supply and demand can be in touch and foster online distribution (e.g. the Valencia Region Tourism Board project Travel Open Apps); macro-regional destination platforms as “one-stop-shop” for in-depth information and booking; promotion of portals such as visiteurope.com, with a section focused on coastal and marine tourism; a European coastal and maritime tourism guide; video productions on you tube channel; TV advertising and documentaries; dedicated satellite channels; port reservation software.

Question 1.11: Please identify any other issues which, in your opinion, should be taken into consideration to improve the competitiveness of Europe's maritime and coastal tourism

Participants replies included the following suggestions: Best practice sharing initiatives: promotion of a program for the development of connectivity to coastal areas; visa facilitation for non-EU tourists; adequate port infrastructure and better port infrastructure planning, including new and clear legislation for cruising/port cities in order to harmonize procedures; work on common standards regarding boating; invest in infrastructure, harbours, piers and marinas; develop expertise and knowledge on sustainable tourism; promote coastal walking/cycling routes with access to the shore (e.g. provision of bike rental machines to deliver a workable link from marinas/piers to local towns); encourage joint efforts on Regional Tourism Measurement are to be considered, instead of dividing them accordingly to the type of tourism developed; designation of inshore "Marine Parks" where no commercial fishing or heavy industry is located, and protection is carried out by specially trained wardens/guides; encourage the development of accessible tourism; increase local involvement of residents and businesses; develop artificial reefs for surfing; create a learning passport with the basic information about the marine environment visited; implement legislation for sewage treatment in cruise vessels; take into account the carrying capacity of a tourist destination; develop an international marketing campaign of EU coastal tourism; tax equalization between countries regarding nautical and maritime tourism; attract the highest skilled workforce to create knowledge and promote best practice within Europe; develop an Agenda of Sustainability for destinations; encourage the development of tools for lakes like the Lacustrine Systems.

Question 2.8: Please identify any other issues which, in your opinion, should be taken into consideration to guarantee the sustainable growth of Europe's maritime and coastal tourism.

Participants replies included the following suggestions: Increase visitors and inhabitants awareness of sustainability concerns; closer cooperation with maritime authorities and tourism stakeholders; steps to mitigate climate change; better management of transport fluxes and promotion of collective transports; natural marine and coastal parks/protected areas to revalorize destinations; local strategic plans for infrastructure; regulate pressure on destinations; incentive policies for energy /water saving; ensure waste treatment, sewage, clean shores; consider tax derogations for sustainable tourism; evaluate the impact of cruise tourism passengers on the sustainability of the destinations; encourage participation in EDEN and in the QualityCoast Award and promote these programs winners in visiteurope.com; environmental labelling; promote certifications instead of labelling; integrate flows and space management issues privileging eco-mobility; preserve/restore biodiversity in mass tourism regions; improve public transport offers to/at destinations; ensure compliance with human rights standards by tourism industry; fair balance between Habitat Protection, marine tourism and need to create sustainable employment; use of agreed EU indicators for sustainable tourism; better visibility for socially, economically and ecologically sustainable tourism products and labels; better port reception facilities.

Question 3.6: Please identify any other actions which, in your opinion, could contribute to the strengthening of the image and profile of Europe's maritime and coastal destinations.

Participants replies included the following suggestions: Develop web-marketing strategies, promote workshops with stakeholders in combination with educational seminars to strengthen competence and quality development; organize large watersports events (offshore race, surf, rowing, canoeing, diving, sailing, etc.) in order to develop the marine leisure image; collaboration with cruise companies for Europe's image promotion; promote Europe through a common issue (ex. maritime tourism) while focusing on regional peculiarities (culture, tradition, products, cuisine, handicraft); combine "excellence destination" label for cruise stops with the QualityCoast Award; enhance the value of quality awards already established such as the Blue Flag beaches and marinas; analyse various European regions specific competitive advantages and how to best promote them; add a layer of social inclusion to destinations, campaigning on the need to protect the coast; promote a comprehensive action (i.e. labels and external UE campaigns) on accessible tourism; create a label for individual marinas or networks of marinas offering a high level service and environmental awareness; create walking and land designations; organise international congresses on coastal and maritime tourism, yearly, in a tour around Europe; develop a quarterly life-style magazine EUROPEAN COAST for all professionals and entrepreneurs; create a dedicated youtube channel on European coastal destinations (collecting and publishing stories/narratives by locals and tourists on coastal experiences Europe-wide); create an "administrative boating pass" for

boats within EU ports and marinas, allowing a safety and administrative standard for all EU countries; adopt and promote a pan-European Whale and Dolphin Sanctuary.

Question 4: Do you have proposals additional to those listed in this Discussion Document that could be undertaken by the European Commission, the Member States and the private stakeholders, to facilitate growth and jobs creation in maritime and coastal tourism?

Participants replies included the following suggestions: Develop tourism products/services extending offer from coastal area to the hinterland, reducing tourism impacts on coastal area and maximising economic benefits to local population; create European policies that promote tourism demand throughout the year; highlight the positive experience of the Adriatic cooperation; develop an educational campaign targeting children and youths to: (a) appreciate marine resources, environment and heritage (b) be aware of coastal and marine activities and job opportunities; (c) develop tools (e.g. books, stories, websites, games) that could assist in this campaign; foster the involvement of residents in the formulation of any kind of cruise policy and help the resolution of potential conflicts among different stakeholders with the use of with integrated planning tools (e.g. Community Benefit Agreement between developer and community etc.); promote a better structuration of the sector (clustering, representation); recognise coastal and maritime tourism as a “thematic priority” in the 2014-2020 EU programming period; identify coastal and maritime tourism as an eligible action under the future interregional cooperation programmes; ensure better coordination between all the different EU financial instruments that could be used at territorial level to support coastal and maritime tourism (ERDF; ESF; EMFF; etc.); ensure technical assistance to help maritime regions which have been working on their own future operational programmes and need clear input on how to support tourism in the framework of the next programming period for 2014-2020; the use of indicators and labels for sustainable management of tourism activities in coastal areas should take into account similar European initiatives like ECO Label or ETQ Label and create synergies with them; developing the principles of the sustainable and responsible tourism (accordingly with the European Charter); establish a permanent technical expert group on coastal line protection and coastal erosion (e.g. connected to the EU ICZM Expert Group); special support for island tourism; preserve the architecture of coastal zones (preservation of the regional identity); improve and full implement strategies/regulations; funding/ fiscal incentives for sustainable tourism and innovative/diversified offers; promotion of good practices by sustainability labels and prioritized marketing; create marine protected areas and national parks along the coast; create more cross-sectorial networks (eg: Food and Drink; Heritage; Creative Industries) to encourage innovation and growth; explore how ICT can enable greater marketing reach and assist with business support; promote the creation and the development of passenger transport lines, in particular sea transport and air transport (which should link in a fast way the main centres of the different coastal regions of a same macro-area); promote education and training programs for nautical and maritime technicians; modernize the visa regulation (not only the tourist visas, but also e.g. rules for transit visas for crew members on cruise ships); establishment of a European "Center of Excellence" for the gathering and dissemination of best practice

and statistical information on coastal tourism; give due consideration to the Marine Strategy Framework Directive; increased cross-border cooperation between maritime cities.